iMATCH Training

Basic Features

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About iMATCH

- Direct Certification system – used by SFAs to identify students eligible for free meal benefits via assistance programs (SNAP, TANF)

- System compares enrollment information from Infinite Campus and DSS data nightly

- Identical entries between the two files are matched, and listed on the corresponding school district list

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Software Support

- Windows 7 will not be supported in SY17-18
- Windows 8 mainstream support will end 1/9/18

- Cybersoft may have difficulty in providing technical assistance for unsupported operating systems

- Provide communication to the technology coordinator

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Features to Cover

- Obtaining Direct Certification List
- Direct Certification Notification Letters
- New Match Notification Email to SFA
- Determine daily change of Direct Cert List
- Direct Certification by school site
- File Search feature
- How to use the Potential Matches tab

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Obtaining the Direct Certification List

▸ Student Eligibility
▸ Administration
▸ DC Matching
▸ Matched – All Match Methods selected

| Student Eligibility | System |

DC Matching

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year
2016 - 2017

Site Code   Site
-- All --   -- All --

SSN / Student ID   Last Name   First Name   Grade   Status
                                            --All--   Active

Case Number   Match Date From   Match Date To   Match Method ⓘ
                                                ☑ System ☑ Sibling ☑ Manual ☑ Transfers   Apply Reset

Matched Students   ☐ Exclude Previously Notified Students   ☐ Exclude Previously Free Students   Notify All Notify Export

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Obtaining the Direct Certification List

▸ Export allows to save full list in Excel format

Matched Students   ☐ Exclude Previously Notified Students   ☐ Exclude Previously Free Students   Notify All Notify Export

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email ☐	Print ☐
030280375	Omland	Austin	001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
052364178	Heckler	MaKayla	001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
053081783	Alston	Kody	001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
035459528	De La Cruz Ruano	Edgard	001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
047417609	Estes	Jackson	003	08	7/6/2016	7/6/2016	7/6/2016	System	1/27/2017	☐	📄
049910278	Bax	Kristofer	001	12	8/5/2016	8/5/2016	8/5/2016	System	1/27/2017	☐	📄
025101478	Klebsch	Skyler	001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
035348615	Metzinger	Jace	001	10	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
028913792	Fahrni	Michael	001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄
040887615	Aidinger	Brooke	099	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	☐	📄

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Obtaining the Direct Certification List

▸ Export allows to save full list in Excel format

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Notification Letters

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Notification Letters

System -> Sites and Users-> SFAs
- Official tab

Notification Letters

Official tab – Determining Official

New Match Notification Email

From: IMATCH@state.sd.us <IMATCH@state.sd.us>
Sent: Friday, January 20, 2017 2:03 PM
To:
Subject: New Direct Approval Matches for 1/20/2017

Good Afternoon,

You have new Direct Approval matches that are ready to be notified. They can be found by following this path: *Student Eligibility>> Administration >> DC Matching:* Click the previously matched tab, and then check the Exclude Previously Notified Students checkbox.

Have a great day!

Student Eligibility → Administration → DC Matching → Matched tab

DC Matching

| Potential Matches | Sibling Search | Matched | File Search |

Academic Year

Site Code   Site
-- All --   -- All --

SSN / Student ID   Last Name   First Name   Grade   Status
                                                  --All--   Active

Case Number   Match Date From   Match Date To   Match Method
                                                   ☑ System ☑ Sibling ☑ Manual ☑ Transfers   Apply Reset

Add a one-day buffer in the 'From' date range

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Eligibility Hierarchy

- iMATCH identifies the hierarchy of direct certification benefits
- SNAP > TANF

- Supersede to direct certification – highest form of direct certification is SNAP

Patrons → Students → search for a student → click on the Student ID

| Student Eligibility | System |

Students

Applications

Administration

Direct Approvals

DC Matching

Grace Period Letters

1 Patrons

2 Students

Site Code   Site   Grade
--ALL--   --ALL--   --ALL--

◉ Student ID/SSN   Last Name   First Name
○ PIN
○ State ID   **3**

Student ID/SSN   Birth Date   Status
                    _/_/___   Active

Apply Reset

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Direct Certification List
– Daily Change using Date Range

DC Matching

| Sibling Search | Potential Matches | Matched | File Search |

Academic Year
2016 - 2017

Site Code — -- All --   Site — -- All --

SSN / Student ID   Last Name   First Name   Grade — --All--   Status — Active

From ①   To ②   Match Method ⓘ
☑ System   ☑ Sibling   ☑ Manual   ☑ Transfers

Apply   Reset
③

Matched Students   ☐ Exclude Previously Notified Students   ☐ Exclude Previously Free Students   Notify Selected   Export   Notify All

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email ☐	Print ☐

Student Eligibility → Administration → Matching

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Direct Certification List

▶ Column Sorting

Matched Students					☐ Exclude Previously Notified Students		☐ Exclude Previously Free Students	

ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method
⟩			001	12	7/1/2016	7/1/2016	System
⟩			001	12	7/1/2016	7/1/2016	System

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Direct Certification by Site

Student Eligibility → Administration → DC Matching → Matched tab
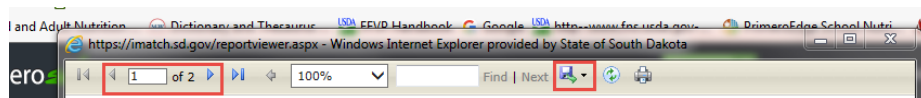

Direct Certification by Site

- Student Eligibility
- Eligibility Reports
  - Eligibility (uncheck Paid, Reduced)
  - Reason (uncheck Default, Denied)

Direct Certification by Site

- Arrows allow user to page through to additional students, or additional sites

- Floppy disk Save icon allows users to save file as Excel
  - Saving as Excel features each site to display as a different tab in Excel

Potential Matches

- Student Eligibility
- DC Matching
- Potential Matches

Potential Matches
Reviewing entries

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Potential Matches

–Matching Criteria

–Reviewing possible match

–Making the Match

Matching Criteria	Student Details	File Details	Points
SSN			0
Student ID			0
Full Name			22
First and Last Name			0
Last and Middle Name			0
First and Middle Name			0
Last Name			0
First Name			0
DOB			0
Phonetic First Name			0
Phonetic Last Name			0
SOUNDEX First Name			0
SOUNDEX Last Name			0
Modified First Name			0
Modified Last Name			0
Name Twist Full Name			0
Name Twist First and Last Name			0
Variable DOB (±10 day(s))			0
DOB Month Year Twist			0
Street Address			0
Guardian			6
Phone 1			0
Phone 2			0
County Code(s)	Brown	Brown	12
		Total - 40 (High)	

[Match] [Mark as Reviewed] [Close]

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File Search

▸ Student Eligibility
▸ Administration
▸ DC Matching
▸ File Search

DC Matching

| Potential Matches | Sibling Search | Matched | File Search |

Search By
○ SSN and Birth Date   ○ Name and Birth Date   ◉ Case Number

Details
Case Number ❶

[Reset]
[Apply] ❷

File Details

PrimeroEdge Student Details		Certification File Details						
	Match Card	ID on File	Last Name	First Name	Birth Date	Case Number	DC Type	File Date
... ❸	View Details... ❹							

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Manual Match from File Search

Manual Match from File Search

Thank you!

- CANS Office: 605-773-3413
- CANS Email: DOE.SchoolLunch@state.sd.us

- PrimeroEdge Customer Support:
1-866-442-6030
- PrimeroEdge Email:
  support@primeroedge.com

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iMATCH
2017

This training credits for 20 minutes of training in
Key Area 3 Administration
3120 Direct Certification

Your Name:

Date of Training:

south dakota
DEPARTMENT OF EDUCATION
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